



Euromonitor
International

Soft Drinks in Ecuador

December 2025

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EXECUTIVE SUMMARY

Sales of soft drinks fall into negative-figure slumps in Ecuador in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price sensitivity becomes notably decisive in consumer behaviour

Functional needs drive selective growth in niche areas

Retail channels appeal to different consumer needs

WHAT'S NEXT?

Sales will stabilise and see moderate growth over the forecast period

Major players will leverage product innovation and marketing strategies

Channel dynamics will remain a critical driver of growth

COMPETITIVE LANDSCAPE

Coca-Cola maintains strong leading place thanks to powerhouse brands and regional support of Arca Continental

Genommalab taps into demand for hydration, recovery, and functional beverages with Suerox

CHANNELS

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[Bottled Water in Ecuador](#)

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2025 DEVELOPMENTS

Sales of bottled water struggle to stay afloat due to lower demand

INDUSTRY PERFORMANCE

Bottled water faces sales pressure due to economic challenges and weather fluctuations

Carbonated bottled water sees some resilience due to a more premium perception

WHAT'S NEXT?

Bottled water will return to positive volume growth, thanks to aligning with health and wellness trends

Portfolio expansions and flavour innovations will help to support growth in bottled water

Health and sustainability trends: a double-edged sword for bottled water

COMPETITIVE LANDSCAPE

Tesalia Springs Co dominates carbonated bottled water with Guitig, supporting its leading place

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[Carbonates in Ecuador](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

A negative performance for carbonates in Ecuador, caused by several reasons

INDUSTRY PERFORMANCE

Weather, political uncertainty, and retail challenges impact performance

Reduced sugar options are generally preferred, while regular tonic water benefit from demand for mixers

WHAT'S NEXT?

Flat growth expected due to category maturity and channel shifts

Marketing as a key differentiator in a saturated carbonates market

Health and wellness as a structural challenge for carbonates

COMPETITIVE LANDSCAPE

Coca-Cola maintains strong lead thanks to well-known brand portfolio and distribution reach of Arca Continental

Tesalia Spring benefits from Pepsi's more affordable price compared to Coca-Cola

CHANNELS

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Discounters channel sees strongest growth from a low base

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[Concentrates in Ecuador](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Stable yet flat growth for concentrates, reflecting low baseline demand

INDUSTRY PERFORMANCE

Low volume growth supported by somewhat flat baseline demand

Iced tea concentrates continue to increase in popularity

WHAT'S NEXT?

Ongoing flat growth driven by advertising and affordability
Flavour innovation will remain key in new product developments
Health and wellness trends pose both challenges and opportunities in concentrates

COMPETITIVE LANDSCAPE

Quala maintains its strong lead as the main player in concentrates
Sumesa returns to strength after a period of financial and administrative challenges

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[Juice in Ecuador](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice faces challenges from high sugar content and high prices

INDUSTRY PERFORMANCE

Juice drinks see small positive volume growth thanks to affordability compared to other juice options
Coconut and other plant waters benefit from aligning with health and wellness trends

WHAT'S NEXT?

Moderate growth ahead for juice, with maturity in core categories and opportunities for rising preferences
Functional positioning to drive growth in coconut water and 100% juice
Health and wellness trends weigh on nectars as sugar becomes a red flag

COMPETITIVE LANDSCAPE

Ajecuador SA leads juice with an affordable portfolio and wide distribution
Combined "others" see the strongest growth, thanks to rising popularity of private label

CHANNELS

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[RTD Tea in Ecuador](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy growth for RTD tea, thanks to rising popularity of these products

INDUSTRY PERFORMANCE

RTD tea continues to expand as a refreshing and accessible alternative beverage
Still RTD tea is the main product in the category, although opportunities remain for kombucha

WHAT'S NEXT?

RTD tea shows low maturity and ongoing growth potential
Lack of innovation suppresses stronger growth in RTD tea
Health and lifestyle positioning strategies will support sales

COMPETITIVE LANDSCAPE

Fuze Tea drives overall category growth through strong distribution and wellness positioning
Small players and private label slowly carve out space

CHANNELS

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Energy Drinks in Ecuador

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy volume growth is stronger than value growth in energy drinks

INDUSTRY PERFORMANCE

Functional appeal drives growth of energy drinks, amid competitive pressures

Reduced sugar energy drinks see slightly stronger growth, albeit sugar is not a key concern in energy drinks

WHAT'S NEXT?

Ongoing growth driven by affordable options, while premium offerings will remain niche

Innovation, storytelling, and media investment will support growth

Functionality remains the key driver for energy drinks sales

COMPETITIVE LANDSCAPE

Tesalia Spring Co maintains lead thanks to popularity and wide distribution of its V220 brand

Coca-Cola's Fury supports robust growth for the player

CHANNELS

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Sports Drinks in Ecuador

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports drinks suffer from lower consumer spending power and lack of demand due to poor weather conditions

INDUSTRY PERFORMANCE

Divergent trends seen in sports drinks, with oral rehydration solutions attracting attention

Regular sports drinks dominate over reduced sugar options, with brand awareness key to sales

WHAT'S NEXT?

Growth and opportunities remain for sports drinks, despite affordability pressures

Expanding beyond modern trade will be a key strategy to growth

Health and wellness trends drive hydration but challenge sugar-rich sports drinks

COMPETITIVE LANDSCAPE

Ajecuador SA Leads Sports Drinks with a variety of presentations

Genommalab benefits from the ORS positioning of Suerox

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Small local grocers remain the leading distribution channel for sports drinks

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